

# HIGHRADIUS ELECTRONIC INVOICE PAYMENT PORTAL (“EIPP”) CUSTOMER GUIDE

# Objectives

Upon completion of this training, you will be able to:

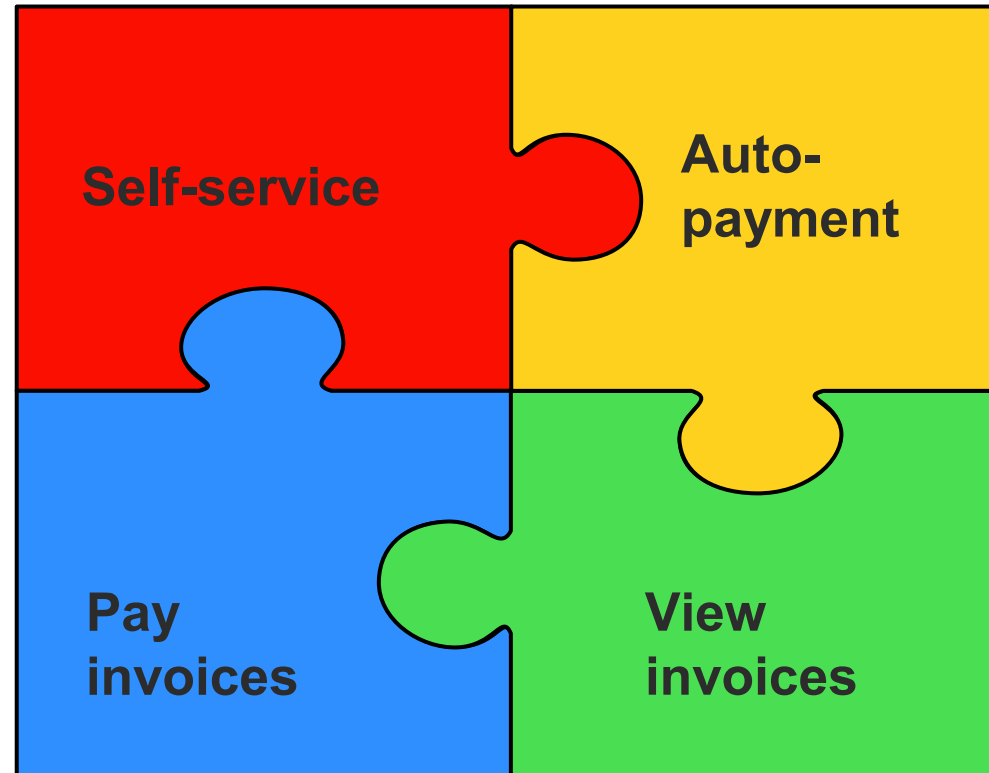
- Registration and login process
- Reset Password
- How to view Invoices
- How to pay invoices
- Partial Payments
- How to set up Auto payment
- How to view closed bills
- All Portal Payments
- Administration
- Customer Onboarding : Invite Contact
- Exports
- Settings
- FAQ

# Objective

To train users on the Electronic Invoice Presentment & Payment Portal (“EIPP”), powered by HighRadius. Which, will help provide a hassle-free and user-friendly experience for EIPP’S customers while performing their day to day activities.

# Features and Benefits of New Portal

Some key features and benefits of EIPP are:



# REGISTRATION AND LOGIN PROCESS

# Registration: Email Invitation Example

[External Sender] agron inc. : Register for our new Online Payment Portal External Inbox x



**Invite Contact** <paymentportal@agron.com>  
to me ▾

Dear Valued Customer,

Please register for our new portal so that you can :

- Conveniently review and print your invoices
- Make payments
- View your account history
- Other new features

There's no cost to register, and you'll avoid delays in your payments being recorded to your account.

**Follow this link to register :** <https://radiusone.com/radiusoneweb/isThroughCashApp?token=135439ba-ca43-4159-a317-89a5ad5d4f4c>

Please reach out to us at [paymentportal@agron.com](mailto:paymentportal@agron.com) if you have questions about the portal.

Regards,

agron inc.

***agron, inc.***

Clicking on this link, you  
will be redirected to the  
Registration Page

- ❑ This is an example of the Email a Customer will receive on being invited to the portal via the Merchant.

# Registration: Email Invitation Example

*agron, inc.*

Register now to view and pay your agron invoices. You will need your Customer # and a Current Open Invoice #.

**Instructions to be followed:**

1. Please make note of your password as it's required in the next login screen.
2. After clicking "Register" it may take 1-2 minutes to execute.
3. You must log in at least once with the new password to complete the registration process.

### Register

First Name\*


Last Name\*

Password\*  ⓘ

Confirm Password\*

Invoice Number\*

Customer Number\*

I'm not a robot  reCAPTCHA  
Privacy - Terms

I accept the [Terms & Conditions](#)

**Register**

[Privacy Policy](#)  
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Clicking on the register button, you will be redirected to the login page where email would be pre-populated

# Registration: Login Page

**agron, inc.**

Change Language ▾

Login to Pay Your agron  
Invoices

## Login

Email\*

Password\*

Remember Username

Login

[Not Enrolled? Sign up now.](#)

[Forgot your password?](#)

[Privacy Policy](#)

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If you have any questions, please contact us at (800)-966-7697.



# RESET PASSWORD

# How to Reset Password

*agron, inc.*

Change Language ▾

Login to Pay Your agron Invoices

## Login

Email\*

Password\*

Remember Username

Login

[Not Enrolled? Sign up now.](#)

[Forgot your password?](#)

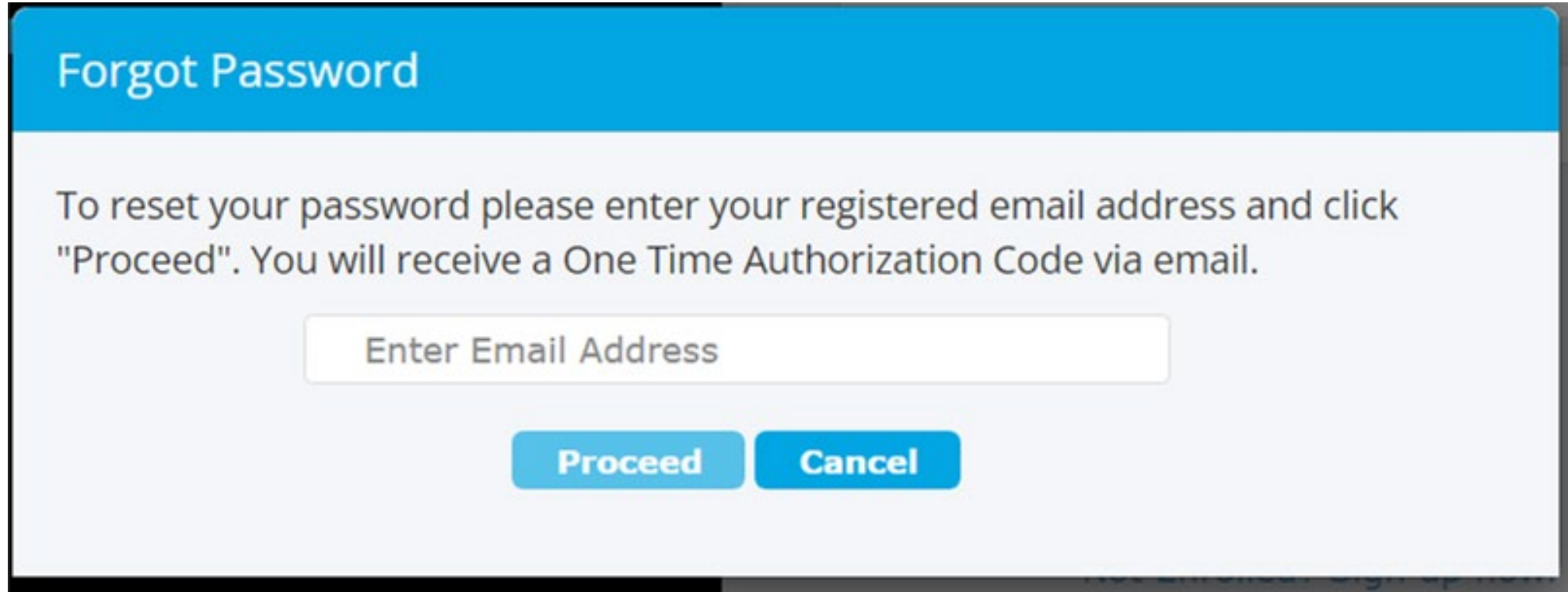
[Privacy Policy](#)

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If you have any questions, please contact us at (800)-966-7697.

Click on 'Forgot your Password?' and a pop-up should appear.

# How to Reset Password



**Forgot Password**

To reset your password please enter your registered email address and click "Proceed". You will receive a One Time Authorization Code via email.

**Proceed** **Cancel**

Enter your registered email address and click on Proceed.

# How to Reset Password

Your One Time Authorization Code (OTAC) is:

2cdhN

Please click on this [link](#) to reset password.

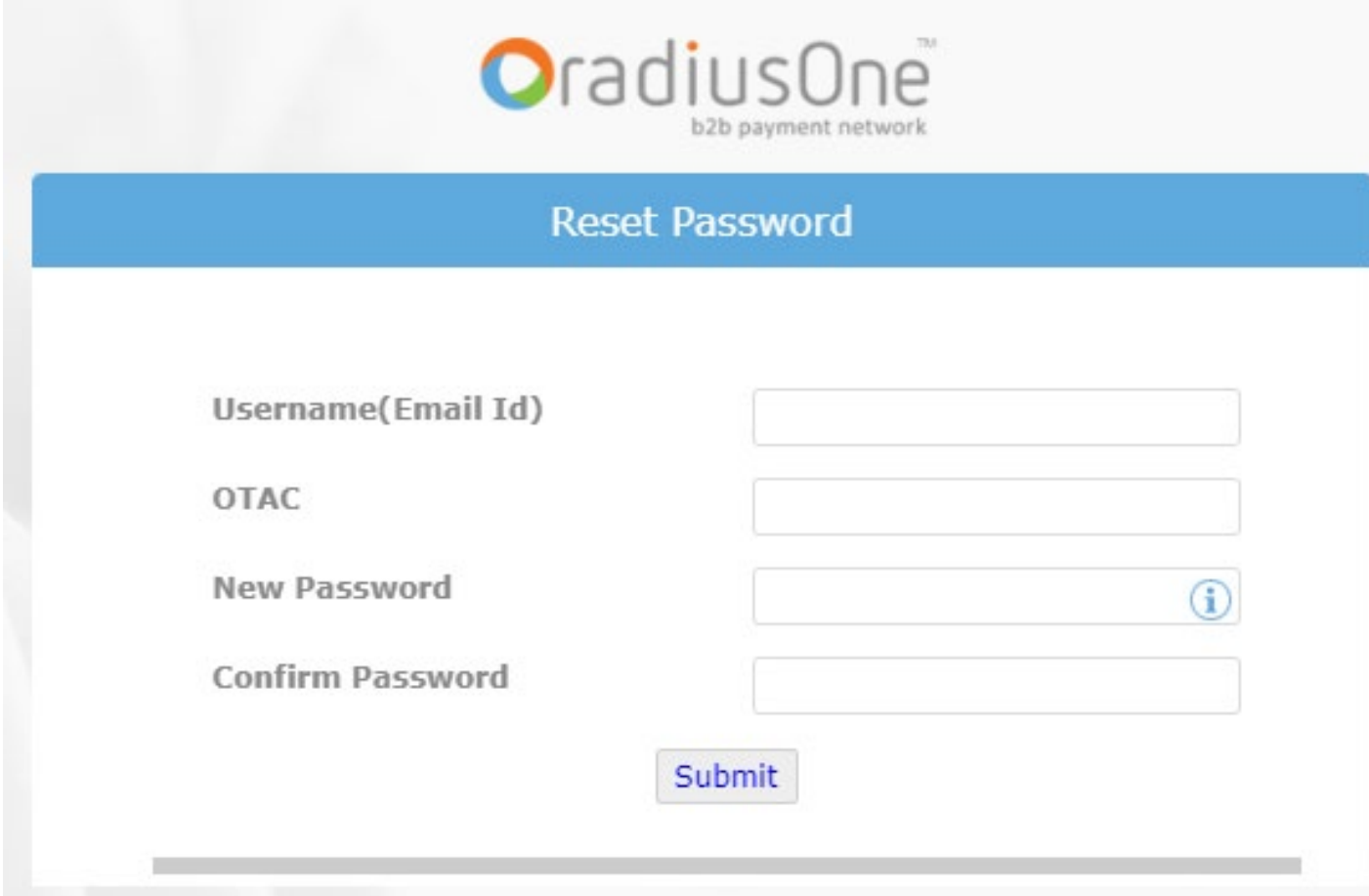
Please note that your One Time Authorization Code will be valid for 30 minutes from the time of request.

Regards,  
HighRadius Support

Disclaimer: This is an auto-generated email. Please do not reply to this email.

This is what your email will look like. Click on the link to open a new tab.

# How to Reset Password



The screenshot shows the RadiusOne password reset interface. At the top, the RadiusOne logo is displayed with the tagline "b2b payment network". Below the logo is a blue header bar with the text "Reset Password". The form contains four input fields: "Username(Email Id)", "OTAC", "New Password", and "Confirm Password". The "New Password" field includes an information icon. A "Submit" button is located at the bottom of the form.

Enter the necessary details and click on Submit to change your password successfully. Post doing this, you can login with your new updated password.

# How to View Invoices

# How To View Invoices

**agron, inc.** Session expires in: 59 mins and 36 secs Welcome Test THESHO4 Last Logged in Time : 4 September, 2023, 5:55:45 am CST

EIPP Exports

Workboard Administration All Portal Payments **Open Invoices** Closed Invoices Pre-Payment

Total Open Amount : 1,933.20 USD Selected Payable Amount: - USD 1,933.20 (1 Invoice(s) selected)

Reach out to [paymentportal@agron.com](mailto:paymentportal@agron.com) for raising any disputes.

Select filter to search... Advanced Search

Select All/Deselect All Invoices Pay Selected Bills Enable/Disable Auto Pay

<input checked="" type="checkbox"/>	Customer Number	Customer Name	Invoice Number	Invoice Amount	Payment Status	Payable Amount	Open Amount	Currency	Invoice Due Date	Invoice Date	Payment Terms	Sales Order Number
<input checked="" type="checkbox"/>	THESHO4	THE SHOP	AGR-000138	1,933.20	Open	1,933.20	1,933.20	USD	2024-01-11	2036-02-13		

Step 1: Under **Open Invoices** Menu, select a particular invoice and then go to 'Invoices'

Step 2: Click on **View Invoice** \*Invoice Pdf will be opened in a new window

# How To View Invoices: Advanced Search

**agron, inc.** Session expires in: 59 mins and 36 secs Welcome Test THESHO4 Last Logged in Time : 4 September, 2023, 5:55:45 am CST

EIPP Exports

Workboard Administration All Portal Payments **Open Invoices** Closed Invoices Pre-Payment

Total Open Amount : 1,933.20 USD Selected Payable Amount: - USD 1,933.20 (1 Invoice(s) selected)

Reach out to [paymentportal@agron.com](mailto:paymentportal@agron.com) for raising any disputes.

Select filter to search... **Advanced Search**

Select All/Deselect All Invoices Pay Selected Bills Enable/Disable Auto Pay

<input checked="" type="checkbox"/>	Customer Number	Customer Name	Invoice Number	Invoice Amount	Payment Status	Payable Amount	Open Amount	Currency	Invoice Due Date	Invoice Date	Payment Terms	Sales Order Number
<input checked="" type="checkbox"/>	THESHO4	THE SHOP	AGR-000138	1,933.20	Open	1,933.20	1,933.20	USD	2024-01-11	2036-02-13		

❑ Using '**Advanced Search**', searches can be done based on different parameters.



# How To Pay Invoices

# How To Pay Invoices

The screenshot shows the agron, inc. EIPP interface. At the top left, the logo 'agron, inc.' is displayed. On the top right, there is a session expiration notice: 'Session expires in: 44 mins and 27 secs' and a welcome message: 'Welcome Test THESHO4'. Below this, the user is identified as 'Last Logged in Time : 4 September, 2023, 5:55:45 am CST'. The main navigation bar includes 'EIPP' and 'Exports'. Below this, a secondary navigation bar has 'Workboard', 'Administration', 'All Portal Payments', 'Open Invoices' (which is the active tab), 'Closed Invoices', and 'Pre-Payment'. A summary bar shows 'Total Open Amount : 1,933.20 USD' and 'Selected Payable Amount: - USD 1,933.20 (1 Invoice(s) selected)'. A red text prompt says 'Reach out to paymentportal@agron.com for raising any c'. Below this is a search bar with 'Select filter to search...' and an 'Advanced Search' button. A toolbar contains 'Select All/Deselect All', a download icon, a refresh icon, a sort icon, 'Invoices', 'Pay Selected Bills' (highlighted with a red box), and 'Enable/Disable Auto Pay'. A popup menu is open over 'Pay Selected Bills', showing 'Pay by ACH - No Fee' (highlighted with a red box) and 'Pay by Credit Card - 2.9% Fee\*'. Below the popup is a table of invoices.

Customer Number	Customer Name	Invoice Number	Sales Invoice PDF	Amount	Open Amount	Currency	Invoice Due Date	Invoice Date	Payment Terms	Sales Order Number
<input checked="" type="checkbox"/>	THESHO4	THE SHOP	AGR-000138	1,933.20	1,933.20	USD	2024-01-11	2036-02-13		

Users have payment option within EIPP – ACH

Under **Open Invoices** Menu:

Step 1: select invoice(s)

Step 2: click **Pay Selected Bills**

Step 3: click **Pay by ACH-No Fee**; A popup will appear

# How To Pay Invoices (ACH)

## Pay Selected Bills

**Invoices**  
Preview or Edit the Invoices

**Select Bank**  
Choose the Bank Account for Payment

**Receipt**  
Print or send receipt via email

If the 'Payable Amount' is updated, please click on the 'Re-Calculate' button to view the updated amounts.

Customer Name	Customer Number	Invoice Number	Payable Amount	Payable Amount	Partial Payment
THE SHOP	THESHO4	AGR-000138	1,933.20	1933.2	

Page 1 of 1

Total Net Payable Amount: **1,933.20 USD**

[Cancel](#) [Re-Calculate](#) [Proceed to Pay](#)

Step 4: Ensure all selected invoices are within the payment popup

Step 5: Click Proceed To Pay; a popup will appear

# How To Pay Invoices: Add Bank Account

The screenshot shows the 'Pay Bills' interface with three tabs: 'Invoices', 'Select Bank', and 'Receipt'. The 'Select Bank' tab is active, showing a 'CHOOSE A BANK ACCOUNT' section with three options: 'Saved Bank Account', 'New Bank Account', and 'Save Bank Account For Reuse'. A 'PAYMENT SUMMARY' box displays: 'Payment Amount : 1.00 USD', 'Discounts : 0.00 USD', and 'Amount Payable : 1.00 USD'. At the bottom are 'Cancel' and 'Proceed' buttons.

Step 1: Enter the New Bank Account

20

The screenshot shows the 'Add Bank Account' form with the following fields: 'Bank Country\*' (dropdown menu with 'United States'), 'Currency\*' (dropdown menu with 'USD'), 'Bank Name\*', 'Account Type\*' (dropdown menu), 'Account Number\*' (text input with a help icon), 'Re-enter Account Number\*' (text input), 'Routing Number\*' (text input with a help icon), and 'Account Holder's Name\*' (text input). At the bottom are 'Cancel' and 'Submit' buttons.

Step 2: Enter all the mandatory details (noted with an asterisk \*) & click on **Submit**

# How To Pay Invoices: Print Receipt

## Payment Response

**Invoices**  
Preview or Edit the Invoices

**Select Bank**  
Choose the Bank Account for Payment

**Receipt**  
Print or send receipt via email

Invoice Number	Paid Amount	Transaction Id	Payment Status	Payment Response Message
AGR-00...	19.00	TXUYTUYNXH	Success	Successfully added details to...

**PAYMENT SUMMARY**

Net Paid Amount : 19.00 USD

[Close](#) [Print Receipt](#)

On successful completion of payment this page opens

Step 1: Click **Print Receipt** to generate Receipt

Step 2: Click **Close** to close the popup

# How To Pay Invoices(Credit Card)

The screenshot shows the EIPP 'Open Invoices' interface. At the top, there are navigation tabs: Workboard, Administration, All Portal Payments, **Open Invoices**, Closed Invoices, and Pre-Payment. Below the tabs, it displays 'Total Open Amount : 1,933.20 USD' and 'Selected Payable Amount: - USD 1,914.20 (1 Invoice(s) selected)'. A red warning message says 'or raising any disputes.' Below this is a search filter dropdown and an 'Advanced Search' button. A toolbar contains buttons for 'Select All/Deselect All', 'Invoices', 'Pay Selected Bills', and 'Enable/Disable Auto Pay'. A table of invoices is shown with columns: Customer Number, Customer Name, Invoice Number, Sales Invoice PDF, In Amount, Open Amount, Currency, Invoice Due Date, Invoice Date, Payment Terms, and Sales Order Number. One invoice is selected: THESHO4, THE SHOP, AGR-000138, with an open amount of 1,933.20 USD. A dropdown menu is open over the 'Pay Selected Bills' button, showing two options: 'Pay by ACH - No Fee' and 'Pay by Credit Card - 2.9% Fee\*', which is highlighted with a red box.

Customer Number	Customer Name	Invoice Number	Sales Invoice PDF	In Amount	Open Amount	Currency	Invoice Due Date	Invoice Date	Payment Terms	Sales Order Number
THESHO4	THE SHOP	AGR-000138			1,933.20	USD	2024-01-11	2036-02-13		

Users have payment option within EIPP – ACH

Under **Open Invoices** Menu:

Step 1: select invoice(s)

Step 2: click **Pay Selected Bills**

Step 3: click **Pay by Credit Card-2.9% Fee**; A popup will appear

# How To Pay Invoices (Credit Cards Cont.)

## Pay Selected Bills

**Invoices**  
Preview or Edit the Invoices

**Select Card**  
Choose the Card for Payment

**Receipt**  
Print or send receipt via email

If the 'Payable Amount' is updated, please click on the 'Re-Calculate' button to view the updated amounts.

Customer Name	Customer Number	Invoice Number	Payable Amount	Payable Amount	Partial Payment
THE SHOP	THESHO4	AGR-000138	1,914.20	1914.2	

Page 1 of 1

Total Net Payable Amount: 1,914.20 USD

[Cancel](#) [Re-Calculate](#) [Proceed to Pay](#)

Step 4: Ensure all selected invoices are within the payment popup

Step 5: Click Proceed To Pay; a popup will appear

# How To Pay Invoices (Credit Card Cont.)

**Pay Bills**

**Invoices**  
Preview or Edit the Invoices

**Select Card**  
Choose the Card for Payment

**Receipt**  
Print or send receipt via email

**CHOOSE A CREDIT CARD**

- Saved Credit Card
- New Credit Card
- Save Credit Card For Reuse

AMEX-XXXX-0005

**PAYMENT SUMMARY**

Payment Amount :	14.20 USD
Discounts :	0.00 USD
Surcharge:	0.00 USD
<b>Amount Payable :</b>	<b>14.20 USD</b>

**Cancel** **Proceed**

Step 6: Click on **Saved Credit Card** to use a card already maintained in EIPP

Step 7: If there are currently no saved credit cards, click on **New Credit Card** (Click on **Save Credit Card For Reuse** to save the details)

Step 8: Click **Proceed**; A popup appears, with terms and conditions. Read through and if you accept the terms and conditions, click **Pay**



# How To Pay Invoices: Add Credit Card Details

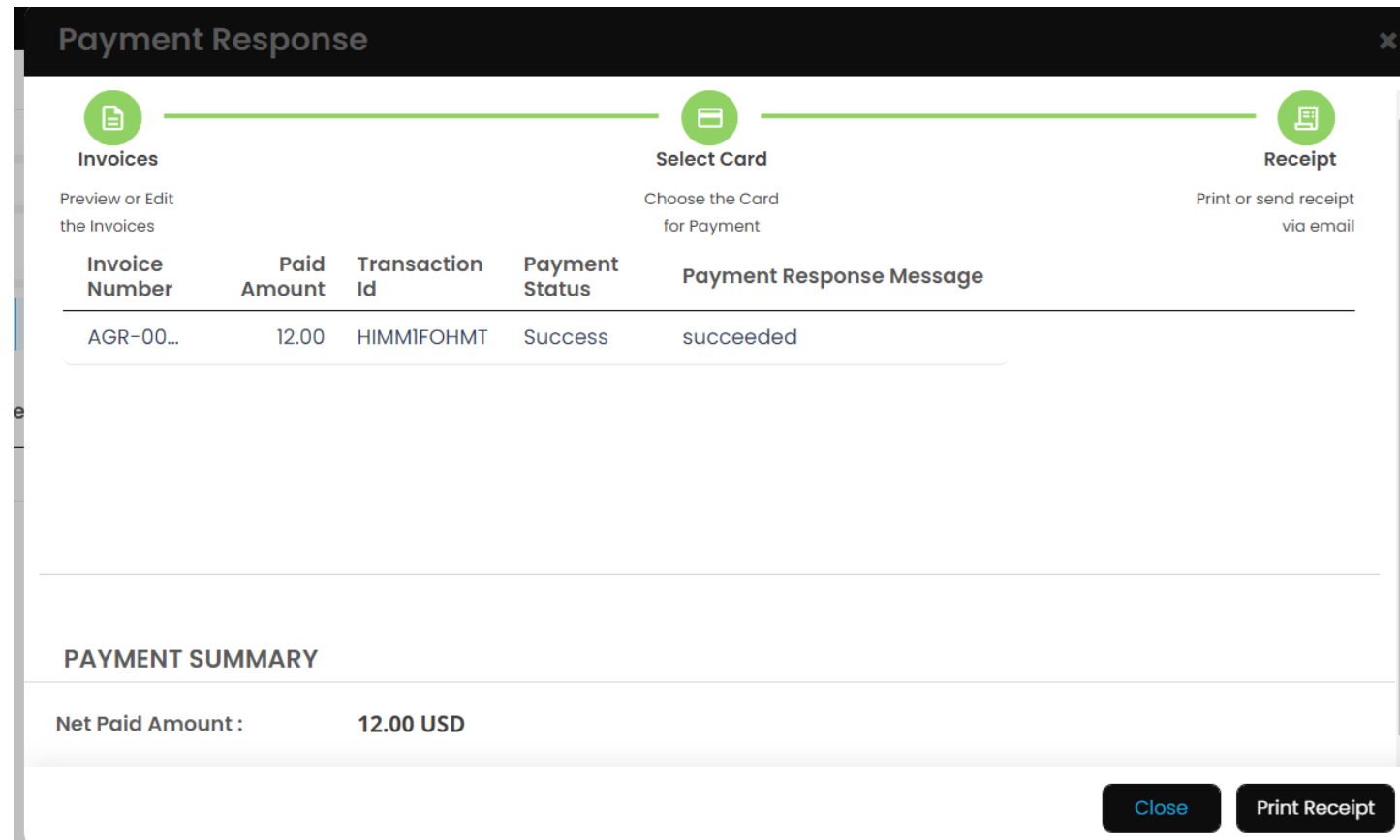
The screenshot shows the 'Pay Bills' interface with three main sections: 'Invoices', 'Select Card', and 'Receipt'. The 'Select Card' section is active, showing a 'CHOOSE A CREDIT CARD' dropdown menu with options for 'Saved Credit Card' (AMEX-XXXX-0005) and 'New Credit Card'. A 'Save Credit Card For Reuse' checkbox is checked. To the right, a 'PAYMENT SUMMARY' box displays: Payment Amount: 14.20 USD, Discounts: 0.00 USD, Surcharge: 0.00 USD, and Amount Payable: 14.20 USD. At the bottom are 'Cancel' and 'Proceed' buttons.

Step 1: Enter the New Credit Card Details

The screenshot shows the 'Enter card details' form with the following fields: Card Type (AmericanExpress), Card Number, Expiry Date (Month: 01, Year: 2023), CVW Number, Card Holder First Name (THE SHOP), Card Holder Last Name, Bill To Address (Address 1, Address 2, City: Tucson, Country: -Select-, State/Province: -select-, Postal Code: 85716), Company, Email, and Phone. Mandatory fields are marked with an asterisk (\*). At the bottom are 'Cancel' and 'Submit' buttons. Logos for TRUSTED COMMERCE and highradius are visible at the bottom.

Step 2: Enter all the mandatory details (noted with an asterisk \*) & click on **Submit**

# How To Pay Invoices: Print Receipt



The screenshot shows a 'Payment Response' popup window with a dark header and a light body. The window is divided into three main sections: 'Invoices', 'Select Card', and 'Receipt'. The 'Invoices' section has a sub-header 'Preview or Edit the Invoices' and a table with one row of data. The 'Select Card' section has a sub-header 'Choose the Card for Payment'. The 'Receipt' section has a sub-header 'Print or send receipt via email'. At the bottom of the window, there are two buttons: 'Close' and 'Print Receipt'.

Invoice Number	Paid Amount	Transaction Id	Payment Status	Payment Response Message
AGR-00...	12.00	HIMMIFOHMT	Success	succeeded

**PAYMENT SUMMARY**

Net Paid Amount : 12.00 USD

Close Print Receipt

On successful completion of payment this page opens

Step 1: Click **Print Receipt** to generate Receipt

Step 2: Click **Close** to close the popup

# HOW TO SET UP AUTOPAY

# How To Setup Auto Pay

The screenshot shows the EIPP Exports interface. At the top, there are navigation tabs: Workboard, Administration, All Portal Payments, **Open Invoices**, Closed Invoices, and Pre-Payment. Below the tabs, it displays 'Total Open Amount : 1,933.20 USD'. A search filter dropdown is present with the text 'Select filter to search...'. Below the search bar, there are several action buttons: 'Select All/Deselect All', a document icon, a calendar icon, a sort icon, 'Invoices', 'Pay Selected Bills', and 'Enable/Disable Auto Pay'. The 'Enable/Disable Auto Pay' button is highlighted with a red border. Below the buttons is a table with the following data:

<input type="checkbox"/>	Customer Number	Customer Name	Invoice Number	Sales Invoice PDF	Invoice Amount	Payment Status	Payable Amount	Open Amount	Currency
<input type="checkbox"/>	THESHO4	THE SHOP	AGR-000138		1,933.20	Success	1,914.20	1,933.20	USD

A user can set up invoices to be automatically paid with a stored payment method

Step 1: Under **Open Invoices**, click on '**Enable / Disable Auto Pay**;' The '**enable/disable autopay**' window will open

# How To Setup Auto Pay (Contd.)

### Enable/Disable Auto Payment ✕

Customer \* : THE SHOP-THESHO4

Auto Pay\* :  Enable Auto Pay  Disable Auto Pay

Payment Frequency\* :  Start Date\* :

Auto Pay Limit\* : No Limit Amount:

Payment Type\* :  Card/Bank Account\* : Select

Fields marked with \* are mandatory

Step 2: Select the 'Enable Auto Pay' radio button & select **Payment frequency**: Daily/weekly/Bi-weekly/monthly.

Step 3: Select **Start Date** for the Autopay.

Step 4: Select **Autopay limit**: Yes/No. If Yes enter the limit amount for the auto-payment.

Step 5: Select **Payment Type**:ACH.

Step 6: Select **Bank Account**: Already added Bank Account/Credit Card is a prerequisite for Autopay

Step 7 : Click on **submit**.

# How To How To Setup Auto Pay (Contd.)

Authorization Page – Please read and accept the below terms. ✕

By clicking “Confirm”, you authorize us to enroll you in our recurring auto-payment program, governed by these terms :

- Autopay will be enabled from the Start Date you select.
- Autopay will take place according to the frequency you have set.
- If you have set an Auto Pay Limit, only those invoices whose sum of payable amounts is less than the set limit will be paid.
- Only Past due invoices are eligible for Auto Pay Program.

I Accept Terms of Agreement

[Cancel](#) [Confirm](#)

Step 8: Click on the checkbox and **confirm** to accept the disclaimer and set-up the recurring auto-payment .

# HOW TO VIEW CLOSED INVOICES

# Closed Invoices

agron, inc.

Session expires in:  
45 mins and 06 secs

Welcome Test THESHO4  
Last Logged in Time : 4 September, 2023, 5:55:45 am CST



EIPP Exports

Workboard Administration All Portal Payments Open Invoices **Closed Invoices** Pre-Payment

Select filter to search...



Advanced Search



<input checked="" type="checkbox"/>	Customer Number	Customer Name	Open Amount	Invoice Amount	Payment Status	Invoice Number	Currency	Invoice Date	Clearing Date	Invoice Due Date	Invoice Amount	Sales Order Number	PO Number
-------------------------------------	-----------------	---------------	-------------	----------------	----------------	----------------	----------	--------------	---------------	------------------	----------------	--------------------	-----------

There are no Records

- The '**Closed Invoices**' tab reflects all the information of the invoices that have been closed.



# Closed Bills (Cont.)

The screenshot shows the 'agr<sup>on</sup>, inc.' interface. At the top right, it displays 'Session expires in: 46 mins and 18 secs' and 'Welcome Test THESHO4' with a last login time of '4 September, 2023, 5:55:45 am CST'. Below this is a navigation bar with 'EIPP' and 'Exports' tabs. A secondary navigation bar includes 'Workboard', 'Administration', 'All Portal Payments', 'Open Invoices', 'Closed Invoices' (which is active), and 'Pre-Payment'. A search bar with 'Select filter to search...' and an 'Advanced Search' button is present. The main content area features a toolbar with icons for refresh, undo, 'Select All/Deselect All', save, and a dropdown menu. This dropdown menu is open, showing options: 'Export current page', 'Export Selected', 'Export all pages', and 'Export All'. Below the toolbar is a table with columns: 'Customer Number', 'Customer Name', 'Open Amount', 'Invoice Number', 'Currency', 'Invoice Date', 'Clearing Date', 'Invoice Due Date', 'Invoice Amount', 'Sales Order Number', and 'PO Number'. The table currently contains the text 'There are no Records'.

❑ 1. Export tab also has the functionality to export the pages.

# All Portal Payments



# All Portal Payments

<input checked="" type="checkbox"/>	Payer Number	Payer Name	Transaction ID	Paid Amount	Currency	Payment Status	Payment Method	Payment Initiated On	Payment Response...	Invoices Paid	Receipt	Paid By
<input checked="" type="checkbox"/>	THESHO4	THE SHOP	TXUYTUYNXH	19.00	USD	Success	ACH - No F...	2023-09-04 06:28:...	Successfull...	<a href="#">View</a>		Test THESHO4

The '**All Portal Payments**' Menu displays the entire list of payments associated with a customer. The screen displays all relevant information about the payment.

# All Portal Payments: View/Email Receipt

The screenshot shows the EIPP Exports interface. At the top, there are navigation tabs: Workboard, Administration, All Portal Payments (selected), Open Invoices, Closed Invoices, and Pre-Payment. Below the tabs is a search bar with a dropdown menu and an 'Advanced Search' button. The main content area displays a table of payments. The table has columns for Payer Number, Payer Name, Transaction ID, Paid Amount, Currency, Payment Status, Payment Method, Payment Initiated On, Payment Response..., Invoices Paid, Receipt, and Paid By. The first row of data is highlighted in orange and contains the following information: Payer Number THESHO4, Payer Name THE SHOP, Transaction ID TXUYTUYNXH, Paid Amount 19.00, Currency USD, Payment Status Success, Payment Method ACH - No F..., Payment Initiated On 2023-09-04 06:28..., Payment Response... Successful..., Invoices Paid View, Receipt (highlighted with a red box), and Paid By Test THESHO4. The Receipt column contains a PDF icon and an email icon.

<input checked="" type="checkbox"/>	Payer Number	Payer Name	Transaction ID	Paid Amount	Currency	Payment Status	Payment Method	Payment Initiated On	Payment Response...	Invoices Paid	Receipt	Paid By
<input checked="" type="checkbox"/>	THESHO4	THE SHOP	TXUYTUYNXH	19.00	USD	Success	ACH - No F...	2023-09-04 06:28:...	Successful...	View	 	Test THESHO4

Step 1: Under the transaction in the **Receipt** column.

Step 2: Click on PDF icon to open the receipt in a new window.

Step 3: Click the mail icon to mail the receipt.

# Administration

# Administration (Manage Bank Account)

agron, inc.

Session expires in:  
57 mins and 32 secs

Welcome Test THESHO4  
Last Logged in Time : 4 September, 2023, 5:55:45 am CST



EIPP

Exports

Workboard

Administration

All Portal Payments

Open Invoices

Closed Invoices

Pre-Payment

Manage Bank Accounts

Manage Credit Cards

[+ Add](#) Select Payer: THE SHOP-THESHO [Mark as Primary](#)

<input checked="" type="checkbox"/>	Account Number	Account Holder's Name	Routing Number	Bank Name	Bank Country	Accessible By...	Saved On	Account Status
<input checked="" type="checkbox"/>	XXXXX6789	Test	111000614	Test	United S...	Yes	2023-09-04 06:28:...	Active

- Under the '**Administration**' tab the necessary bank account changes can be made.
- By going to the '**Manage Bank Account**' option one can add/edit/delete bank account details.

# Administration (Manage Users)

**agron, inc.** Session expires in: 58 mins and 51 secs | Welcome Test THESHO4 | Last Logged in Time : 4 September, 2023, 5:55:45 am CST

**EIPP Exports**

Workboard Administration All Portal Payments Open Invoices Closed Invoices Pre-Payment

Manage Bank Accounts

**Manage Credit Cards**

Select Payer... THE SHOP-THESHO

<input type="checkbox"/>	Card Description	Card Expiry Month	Card Expiry Year	Card Holder Name	Card Status	Accessible By Merchant	Saved On
<input type="checkbox"/>	AMEX-XXXX-0...	12	2023	THE SHOP	Active	Yes	2023-09-0...

- Under the **'Manage Credit Cards'** you can view all the details of the credit cards.

# CUSTOMER ONBOARDING: INVITE CONTACT



# Customer Onboarding : Invite Contact

The screenshot displays the 'agrone, inc.' web application interface. At the top, the user is logged in as 'Test Prod' with a session expiration of 59 minutes and 58 seconds. The main navigation bar includes 'Workboard', 'Administration', and 'Exports'. Under 'Administration', there are options for 'All Portal Payments', 'Open Invoices', 'Closed Invoices', and 'Pre-Payment'. The 'Manage Contacts' tab is active, showing a table of contacts. A 'Select Security Role' pop-up is overlaid on the table, prompting the user to select a security role for the user on registration. The selected role is 'EIPP Customer Admin'. The table below the pop-up shows the following contact information:

Title	Customer Number	Customer Name	First Name	Last Name	Recipient Role	Email Id	Phone(Mobi)	Phone(Busir)	Fax	City	State	Zip
Dr	ZATARI0	ZATARI'S D...	Test	Prod		agrontest2021@dispostable.com						

- ❑ Under the '**Manage Contacts**' tab the necessary user changes can be made.
- ❑ By going to the '**Manage Contacts**' option one can invite a customer contact.
- ❑ Doing so, would show **Select Security Role** pop-up.

# Customer Onboarding : Invite Contact

The screenshot shows the 'agrone, inc.' web application interface. At the top, there's a navigation bar with 'EIPP Exports' and 'Administration' tabs. Below this, there's a search bar and an 'Advanced Search' button. The main content area displays a table of contacts. A modal window titled 'Select Security Role' is open, prompting the user to 'Select the security role to be assigned to the user on registration'. The 'Security Role' dropdown is set to 'EIPP Customer Admin'. The modal has 'Cancel' and 'Submit' buttons. The background table shows a contact with the following details: Title: Dr, Customer Number: ZATARI, Customer Name: ZATARI'S D..., First Name: Test, Last Name: Prod, Recipient Role: agrontest2021@dispostable.com, Email Id: agrontest2021@dispostable.com, Phone(Mobi), Phone(Busir), Fax, City, State, Zip.

The screenshot shows a 'Status' pop-up window. The title is 'Status' with a close button (X). The message inside the pop-up is 'Invitation sent successfully'. Below the message is an orange 'OK' button.

- ❑ Select the required Security Role and click on the **Submit** button.
- ❑ The **Status pop-up** will show **Invitation sent Successful**.

# EXPORTS

# Exports

**agron, inc.** Session expires in: 56 mins and 31 secs Welcome Test THESHO4 Last Logged in Time : 4 September, 2023, 5:55:45 am CST

EIPP Exports

Workboard Administration All Portal Payments Open Invoices Closed Invoices Pre-Payment

Total Open Amount : 1,933.20 USD Selected Payable Amount: - USD 1,914.20 (1 Invoice(s) selected)

Select filter to search... Advanced Search

Select All/Deselect All Invoices Pay Selected Bills Enable/Disable Auto Pay

Customer Number	Customer	Sales Invoice PDF	Invoice Amount	Payment Status	Payable Amount	Open Amount	Currency	Invoice Due Date	Invoice Date	Payment Terms	Sales Order Number
<input checked="" type="checkbox"/>	THESHO4	THE SHOP	1,933.20	Success	1,914.20	1,933.20	USD	2024-01-11	2036-02-13		

Export Selected  
Export all pages  
Exports And Email

Step 1: Under **Open Invoices/Closed Bills/All Portal Payment** .

Step 2: Click **Export page image**.

Step 3: Click on **Export selected page or Export all pages or Export and Email**;  
a pop window will appear

# Exports (Contd.)

Export Selected Records

Export Name:

File Type:  EXCEL (XLS)  EXCEL (XLSX)  CSV

File Separator:

[Less Options](#) [Cancel](#) [Submit](#)

Step 1: Enter the name of the file for **Export name**

Step 2: Select the **file type**

Step 3: Click **submit**; the generated file will be saved in **Exports** tab

# Exports (Contd.)

## Export all pages ✕

Export Name:

File Type:  EXCEL (XLS/XLSX)  EXCEL (XLSX)  CSV

File Separator:

*Note: Number of records are less than or equals to 3000, hence file will exported as XLS.*

[Less Options](#) [Cancel](#) [Submit](#)

Step 1: Enter the name of the file for **Export name**

Step 2: Select the **file type**

Step 3: Click **submit**; the generated file will be saved in **Exports** tab

# Exports (Contd.)

**agron, inc.** Session expires in: 59 mins and 15 secs Welcome Test THESHO4 Last Logged in Time : 4 September, 2023, 5:55:45 am CST

EIPP **Exports**

Exports Summary

Select filter to search... Advanced Search

<< < Page 0 of 0 > >> [Refresh] [Reset] [Delete] [Delete All] No Records to display

<input type="checkbox"/> Export Id	Export Name	Export Time	File Type	File Size	Record Count	Status	File Path	Error File Path
There are no Records								

Records exported using **Export, and Export All** features, from any of the menus (**Open Invoices, Closed Invoices and All Portal Payments**) within the application, will be available in **Exports** Menu as downloadable links.

Exported files are labeled with an “Export Name” that is assigned by the user when exporting the file. This allows you to identify the exported file in **Exports** Menu accordingly.







# SETTINGS



# Settings

- ❑ On the top right corner of portal, a settings icon is available. ⚙️
- ❑ Click on the settings icon.


In **My Profile** section user can edit the account name, Time zone, Amount format, Date format, Default landing page, and password.







	My Profile
	Notification Settings
	Help
	Raise a Support Ticket
	User Activity
	Logout

Redirects to the HighRadius online help portal.

A popup shows up to click on the **Contact Supplier** Tab in the Workboard Screen for assistance.

# Settings (Cont.)

- ❑ On the top right corner of portal, a settings  icon is available.
- ❑ Click on the settings icon.

	My Profile
	Notification Settings
	Help
	Raise a Support Ticket
	User Activity
	Logout

Display all the login activities such as IP address and last login time

Shows a list of all notifications received in the portal.

User can logout from here once the work on the portal is done.

# FAQs

Questions	Answers
How long does it take for HRC to send a one time use code when the customer forgets their password?	The code will be received instantaneously.
If they don't receive the code, is there an option for them to click resend code?	The user can click on 'Forgot Password' again for a new code.
If a user forgets their password and have the one time code sent, will it go to their login email address or the contact information on the customer?	It will be received on the email entered in, in Slide #11.